

Arizona Department Of Transportation

Partnering Evaluation Program

PEP Non-ADOT Facilitator User Manual

April 2005

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Overview

The Arizona Department of Transportation, (ADOT), currently administers nearly \$1 billion in highway construction contracts. The increasing demand for quality, integrity, and excellence in the construction process is a sentiment that is echoed throughout Arizona, and the world.

Beyond the traditional Partnering approach lies PEP IV

The Partnering Evaluation Program, PEP IV, represents a comprehensive approach to automating the project team partnering evaluations at ADOT. PEP II was designed to meet the demands of current and future construction programs.

The PEP II software application was developed based on the intensive research findings performed by the ADOT Partnering Team. PEP II is an effective and efficient project management tool. This tool will assist project team members to answer three common, but often elusive management questions:

1. **What** is the issue?
2. **Why** is a solution necessary?
3. **What** steps must be taken to resolve the issue?

PEP IV identifies, then interprets the data components of a typical construction project, which include, progress measurements, quality, issue resolution, relationship status, and communication opportunities.

The PEP IV program is a bold step forward that will enhance the Partnering efforts in Arizona, and throughout other organizations.

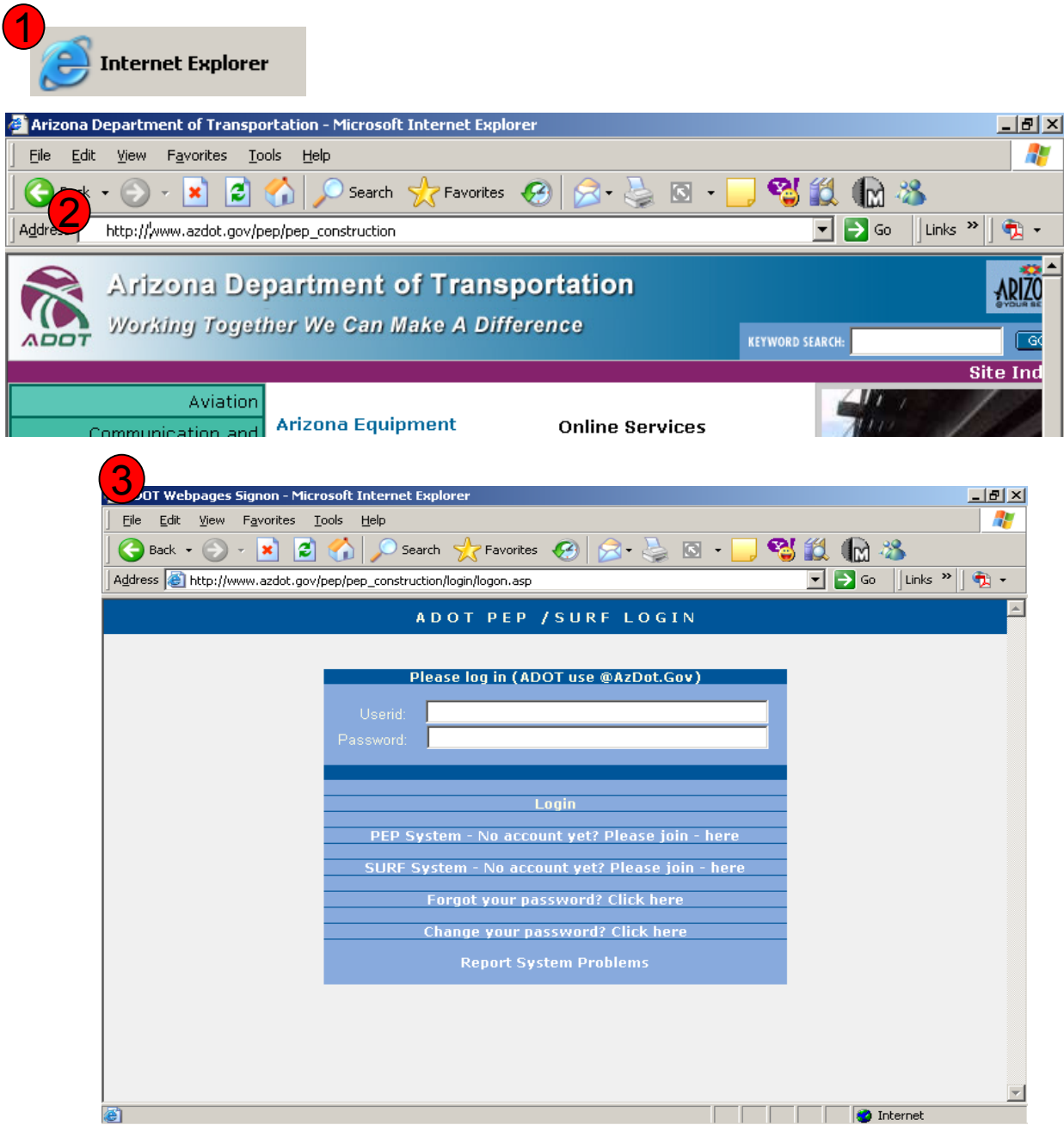
Goals

- Maximize the effectiveness and efficiency of the ADOT Partnering process.
- Expedite timely decisions and increase prompt issue resolution.
- Support the development of an autonomous project team among ADOT, contractors, subcontractors, suppliers, and others.
- Achieve optimal balance between measurement and efficiency in the Partnering process at the Field, District, and the Senior Leader level.

Accessing the PEP Web Application

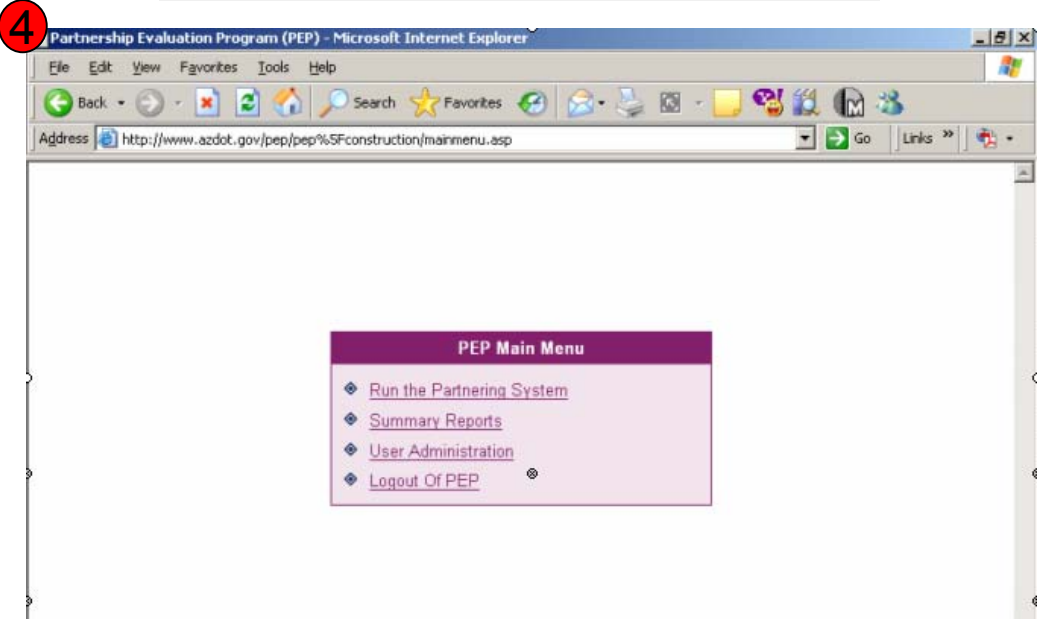
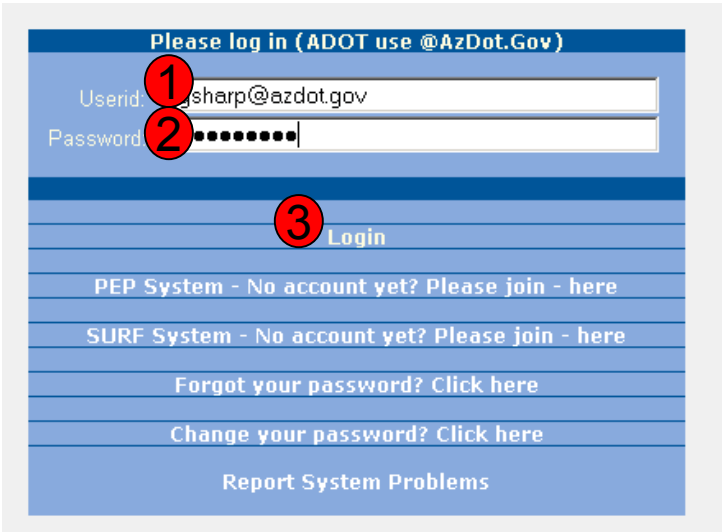
PEP4 is an Internet Based Application which can be accessed using Microsoft's Internet Explorer Software.

- 1. Run Microsoft's Internet Explorer.
- 2. Enter http://www.azdot.gov/pep/pep_construction in the Internet Explorer's address box.
- 3. The ADOT PEP / Surf Login will be displayed.

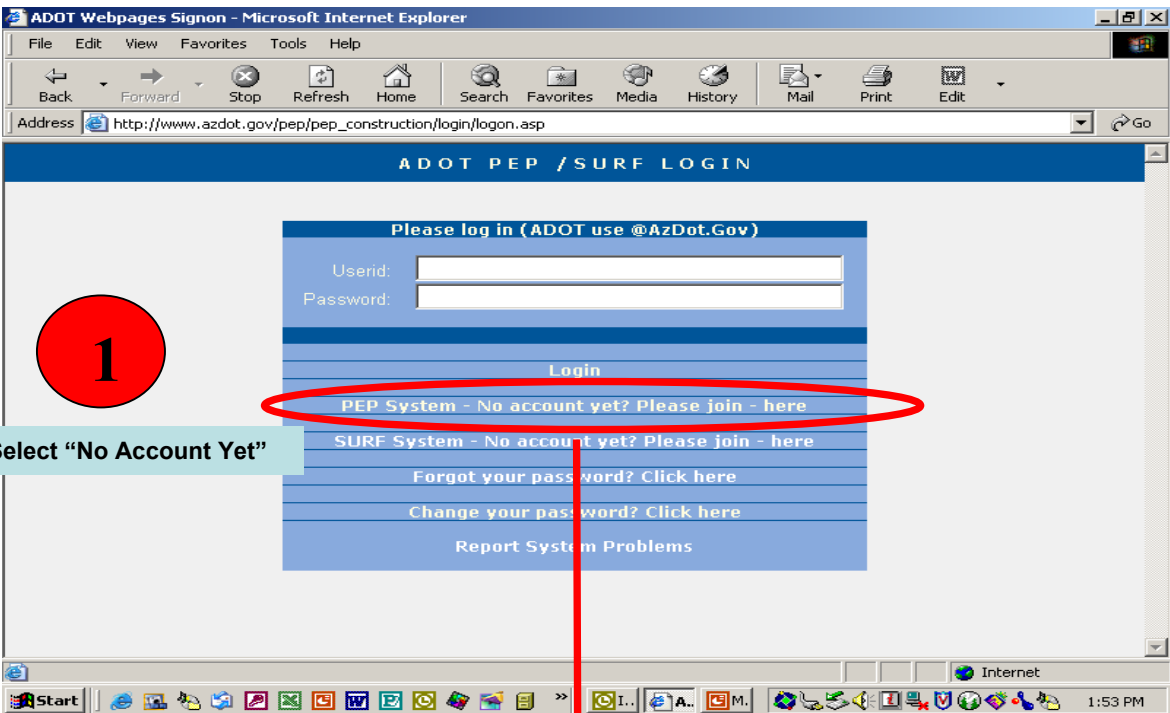


Logging In To PEP – Existing Users

- 1) Enter your PEP User ID.
- 2) Enter your PEP Password.
- 3) Click 'LOGIN'
- 4) The PEP Main Menu will be displayed.

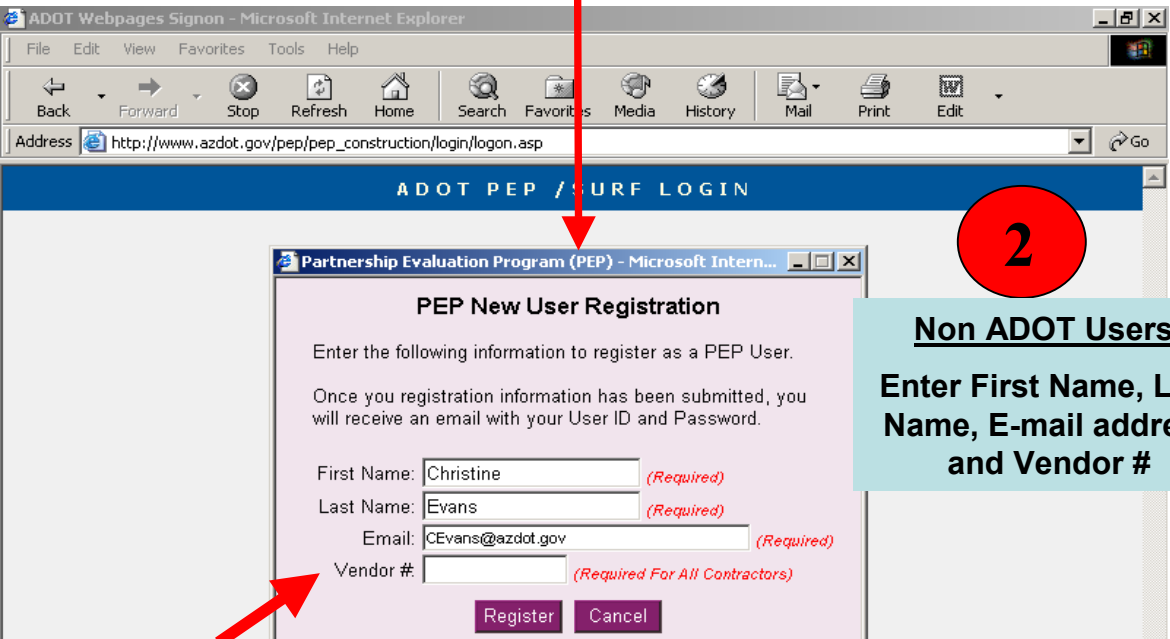


Logging In To PEP – New Users



1

Select "No Account Yet"

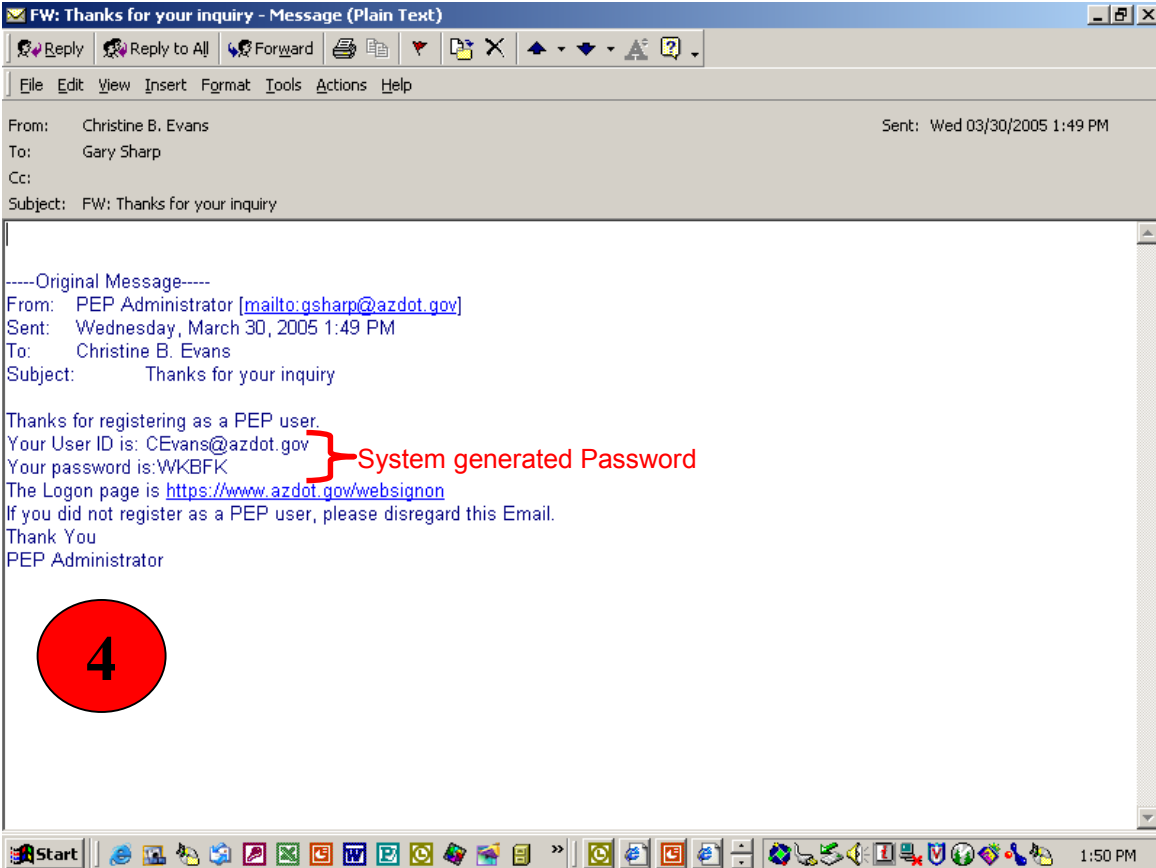
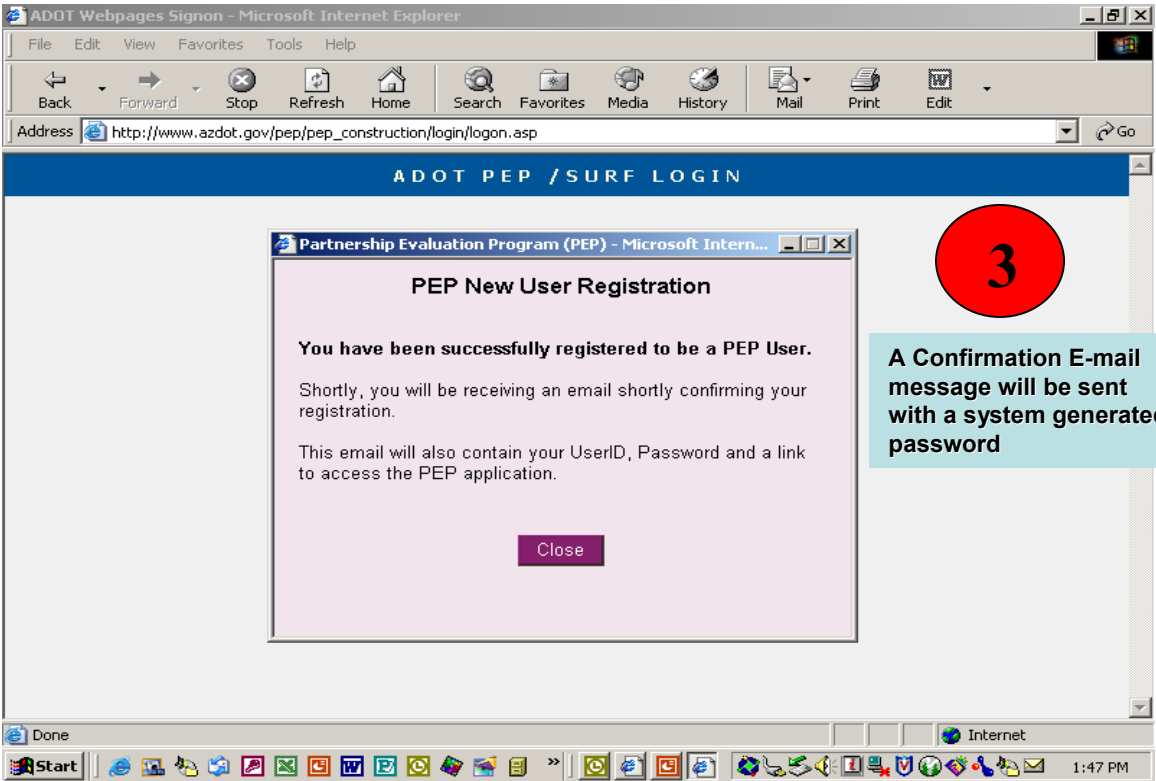


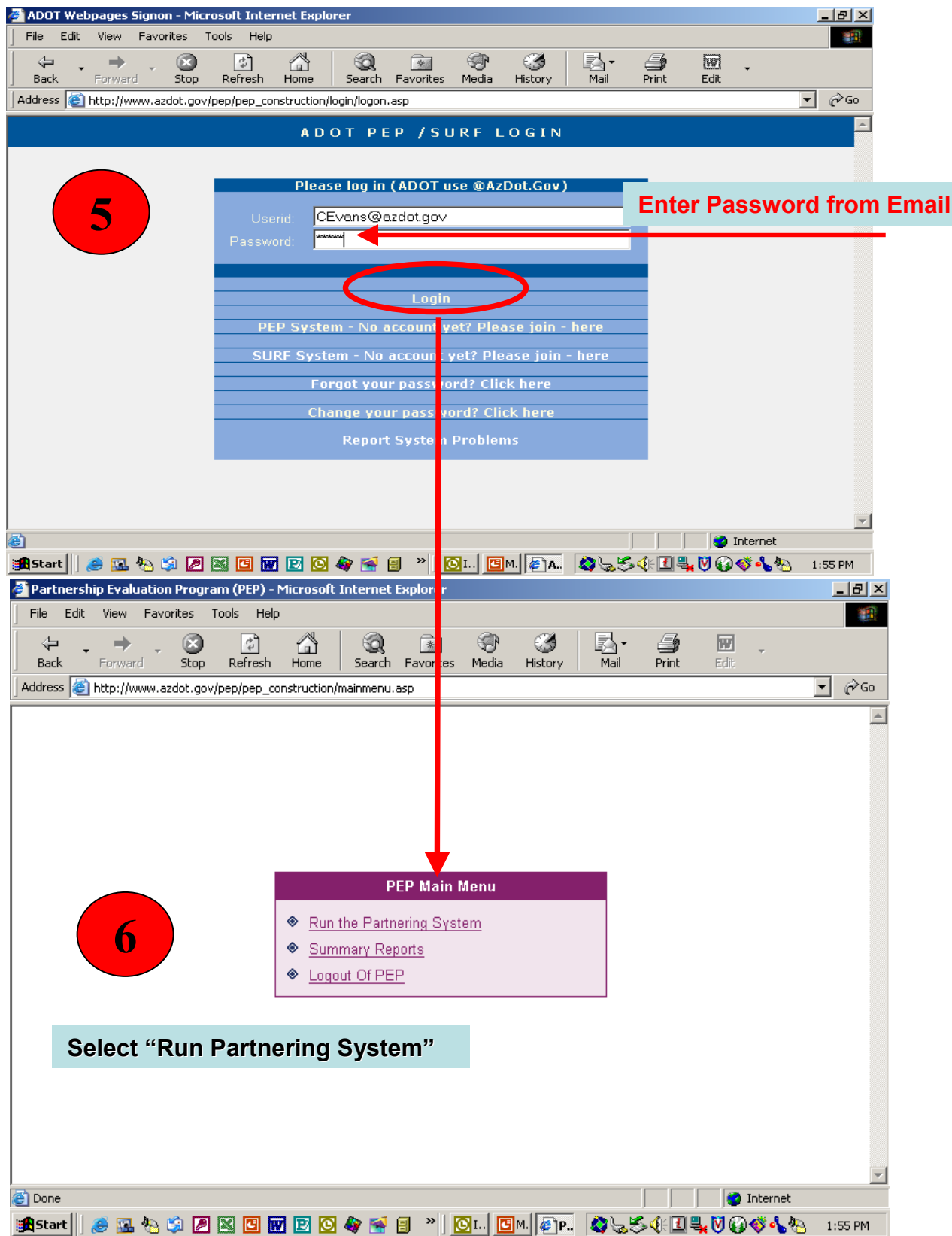
2

Non ADOT Users:
Enter First Name, Last Name, E-mail address and Vendor #

Your Vendor# is the number assigned to your firm that is used to do business with ADOT and other State Agencies. If you do not know your Vendor# please contact your firm for this information. You can also contact ADOA, ADOT Procurement, or the ADOT Partnering Office.

Note: Subs & Suppliers should use the Vendor# of your Prime Contractor

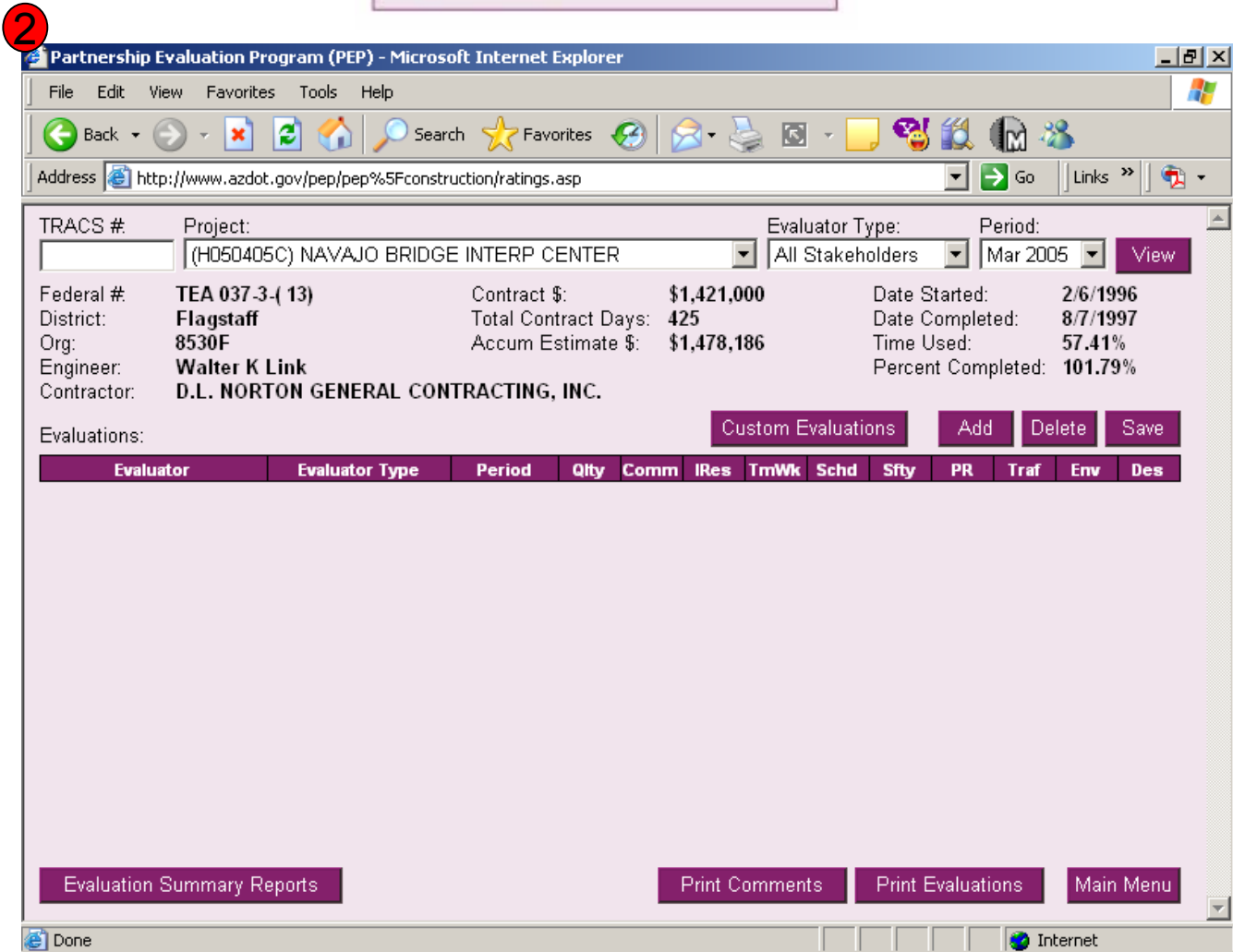
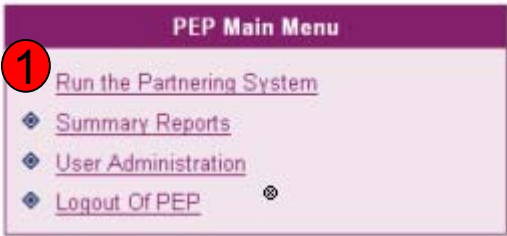




Managing Ratings

From the PEP Ratings Management Screen a user can Add, Edit and Delete ratings/comments, as well as produce a detailed report of ratings and comments.

- 1) From the PEP Main Menu, select 'Run the Partnering System'.
- 2) The PEP Ratings Management Screen will be displayed.



Ratings Screen Described

Partnership Evaluation Program (PEP) - Microsoft Internet Explorer

Address: <http://www.azdot.gov/pep/pep%5Fconstruction/ratings.asp>

TRACS #: Project: (H050405C) NAVAJO BRIDGE INTERP CENTER Evaluator Type: All Stakeholders Period: Jan 2005 [View](#)

Federal #: TEA 037-3-(13) Contract \$: \$1,421,000 Date Started: 2/6/1996
 District: **Flagstaff** Total Contract Days: 425 Date Completed: 8/7/1997
 Org: 8530F Accum Estimate \$: \$1,478,186 Time Used: 57.41%
 Engineer: Walter K Link Percent Completed: 01.79%
 Contractor: D.L. NORTON GENERAL CONTRACTING, INC.

Evaluations: [Custom Evaluations](#) [Add](#) [Delete](#) [Save](#)

Evaluator	Evaluator Type	Period	Qty	Comm	IRes	TmWk	Schd	Sfty	PR	Traf	Env	Des
G Sharp Test01	ADOT Employee	1/2005	4.00	3.00	3.00	2.00	2.00	2.00	4.00	3.00	3.00	3.00
G Sharp Test02	Contractor	1/2005	4.00	4.00	2.00	2.00	2.00	2.00	4.00	3.00	3.00	3.00
G Sharp Test03	SubContractor	1/2005	4.00	3.00	2.00	4.00	3.00	2.00	3.00	3.00	3.00	3.00
G Sharp Test04	Supplier	1/2005	4.00	4.00	4.00	4.00	2.00	4.00	3.00	4.00	4.00	4.00
G Sharp Test05	Other Stakeholder	1/2005	4.00	3.00	2.00	3.00	4.00	2.00	2.00	2.00	2.00	2.00

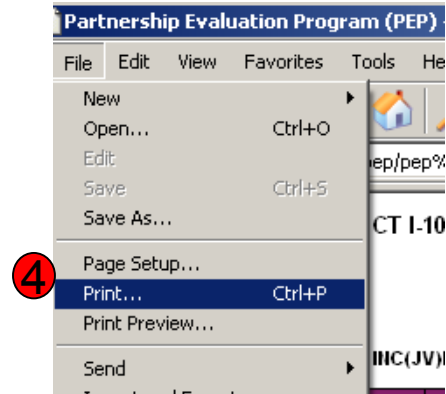
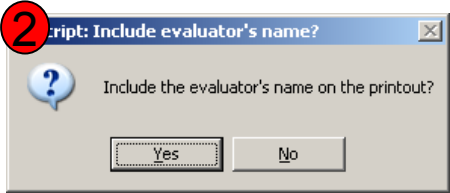
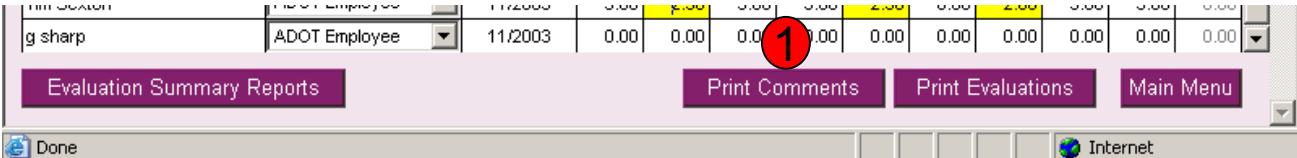
[Evaluation Summary Reports](#) [Print Comments](#) [Print Evaluations](#) [Main Menu](#)

The PEP Ratings Management Screen allows a user to Add, Edit and Delete ratings.

- 1) TRACS # - An entry into this box will search the project list for the specified project's TRACS number.
- 2) Project - Ratings are displayed for the selected project.
- 3) Evaluator Type - Ratings are displayed for the selected evaluator type.
- 4) Period - Ratings are displayed for the selected period.
- 5) View - Ratings are displayed for the selected project, evaluator type and period when clicked.
- 6) Custom Evaluations - Custom evaluations types 6-10 can be defined with this function as well as the sub goals for all evaluation types.
- 7) Add - Adds a new rating.
- 8) Delete - Deletes the currently selected rating.
- 9) Save - Saves any Added or Edited Ratings.
- 10) Ratings - Ratings for a project
- 11) Evaluation Summary Reports - Runs the PEP Summary Reports.
- 12) Print Comments - Prints Comments for the selected Project, Evaluator type and Period.
- 13) Print Evaluations - Prints Evaluations for the selected Project, Evaluator type and Period.
- 14) Main Menu - Returns to the PEP Main Menu
- 15) Information which describes the Selected Project.

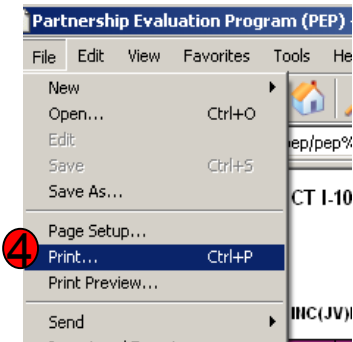
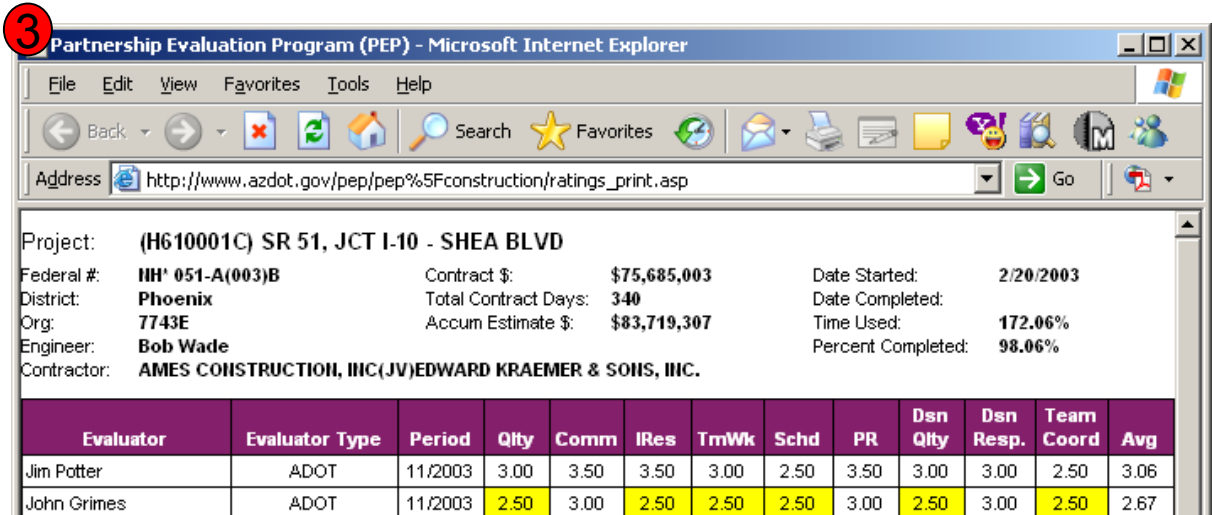
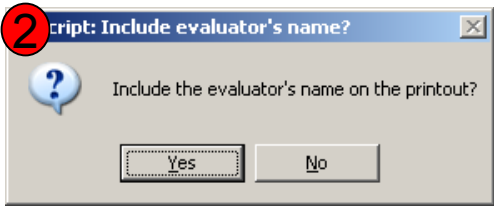
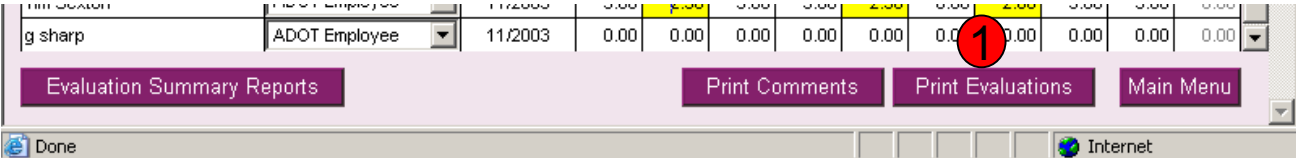
Printing Comments

- 1) Click the 'Print Comments' button on the Ratings Management Screen.
- 2) Select 'Yes' or 'No' whether or not to include the evaluator's name on the comment report.
- 3) The comment report will then be displayed.
- 4) From the File menu, select Print.



Printing Ratings

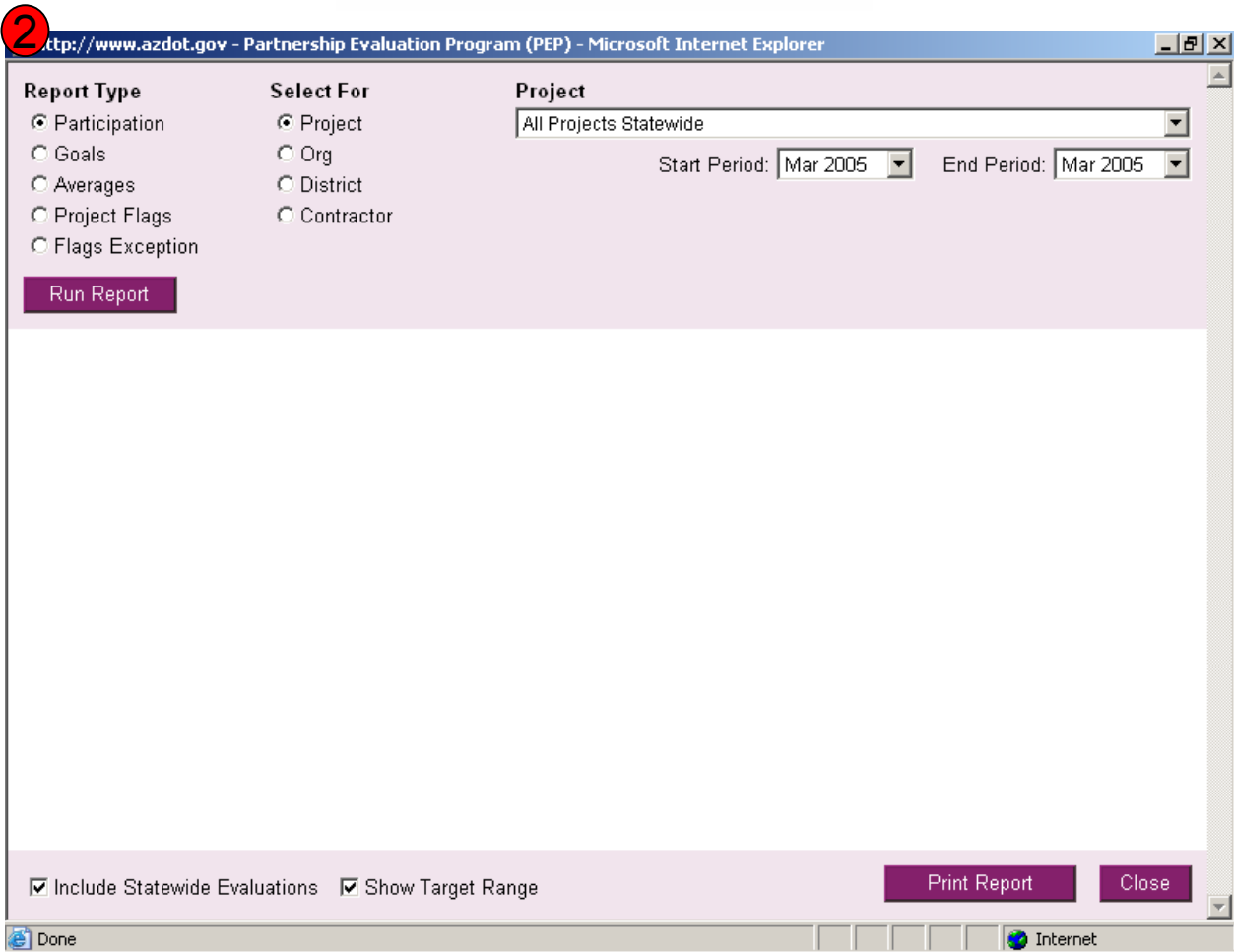
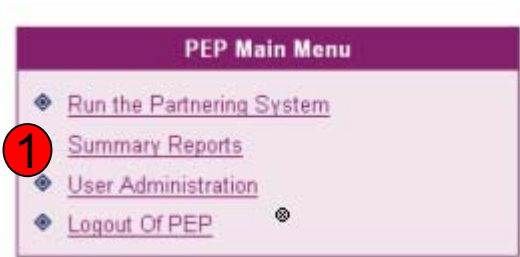
- 1) Click the 'Print Evaluations' button on the Ratings Management Screen.
- 2) Select 'Yes' or 'No' whether or not to include the evaluator's name on the Ratings report.
- 3) The ratings report will then be displayed.
- 4) From the File menu, select Print.



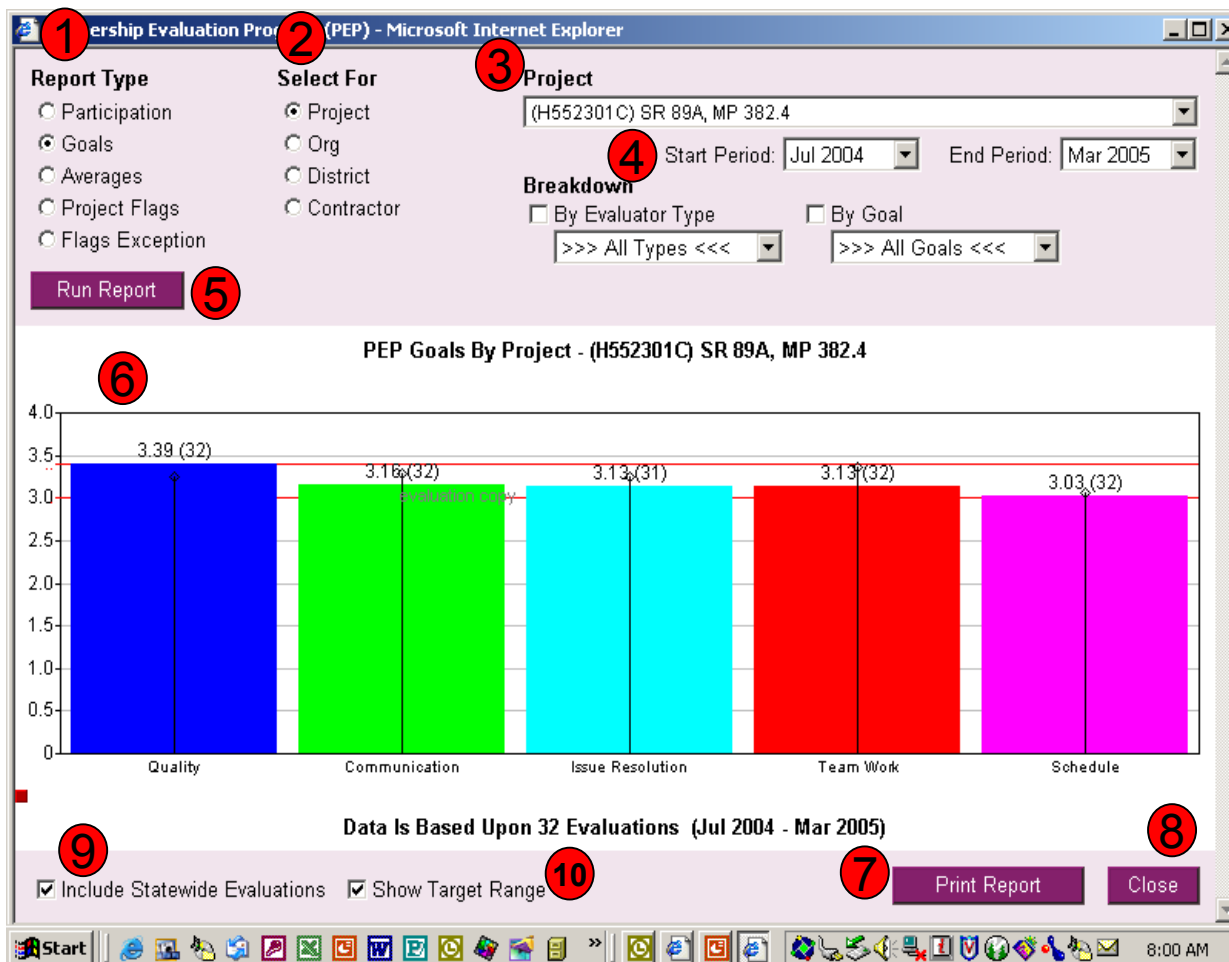
Summary Reports

From the PEP Ratings Management Screen a user can access the PEP Summary Reports.

- 1) From the PEP Main Menu, select 'Summary Reports'.
- 2) The Summary Reports Screen will be displayed.



Summary Reports Described



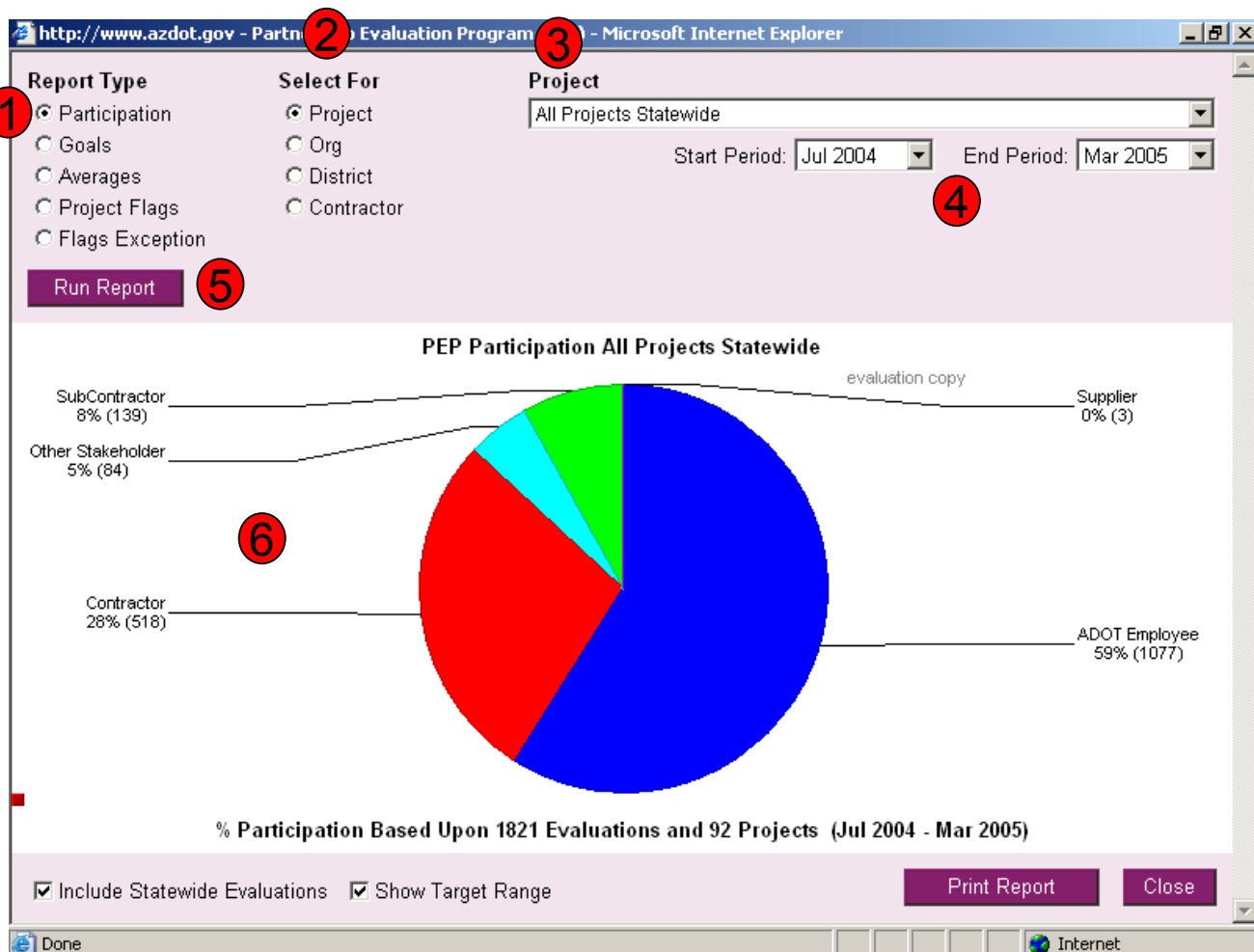
The PEP Summary Reports Screen allows a user to run management style reports for the Partnership ratings managed in the PEP system.

- 1) Report Type – There are five types of reports that can be selected to run.
- 2) Select For – The summary report can be filtered to display information specific to a Project, Org, District or Contractor.
- 3) Select a specific Project, Org or Contractor to filter summary report by.
- 4) Start Period/End Period – A date range to filter the summary report by.
- 5) Run Report – Runs the report for the specified Report Type, Select For Filter and Period Date Range.
- 6) Report Results are displayed in this area.
- 7) Print Report – Prints the current summary report to a printer.
- 8) Close – Closes the Summary Report Screen and returns to the PEP Main Menu.
- 9) Include Statewide Evaluations – Include summary information for partnerships statewide in the summary report.
- 10) Show Target Range – Include the PEP target range markers in the summary report.

Participation Report

The PEP Participation Summary Report displays information related to the participation level by evaluator type for a specified criteria.

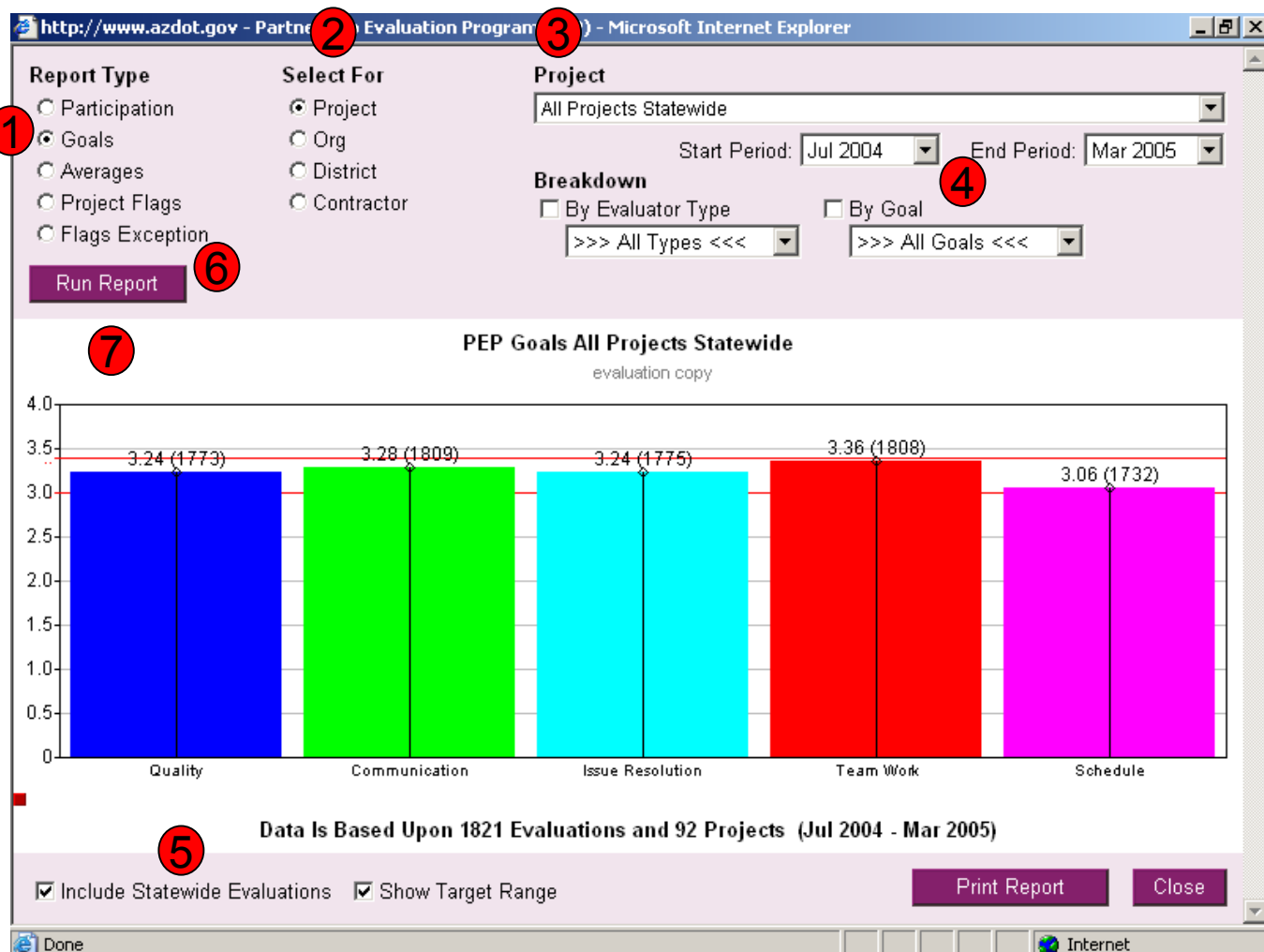
- 1) Click the 'Participation' option.
- 2) Click the option for which ratings for the reports will be filtered.
- 3) Select detailed criteria for which ratings will be included in the report.
- 4) Select the Period Date Range for which ratings will be included in the report.
- 5) Click the Run Report Button.
- 6) The Participation summary report will be displayed.



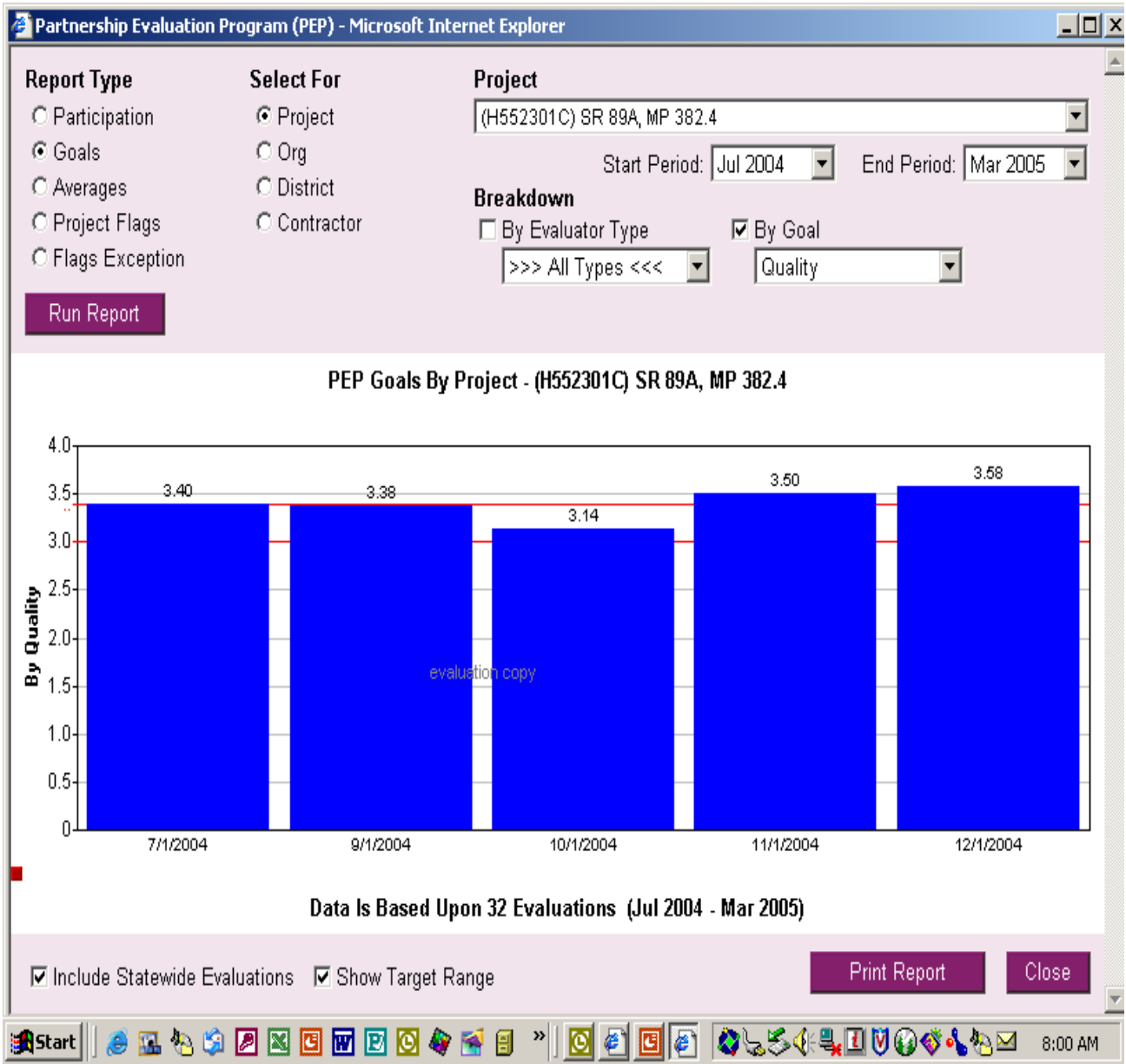
Goals Report

The PEP Goals Summary Report displays information related to how well a selected criteria is achieving its partnering goals.

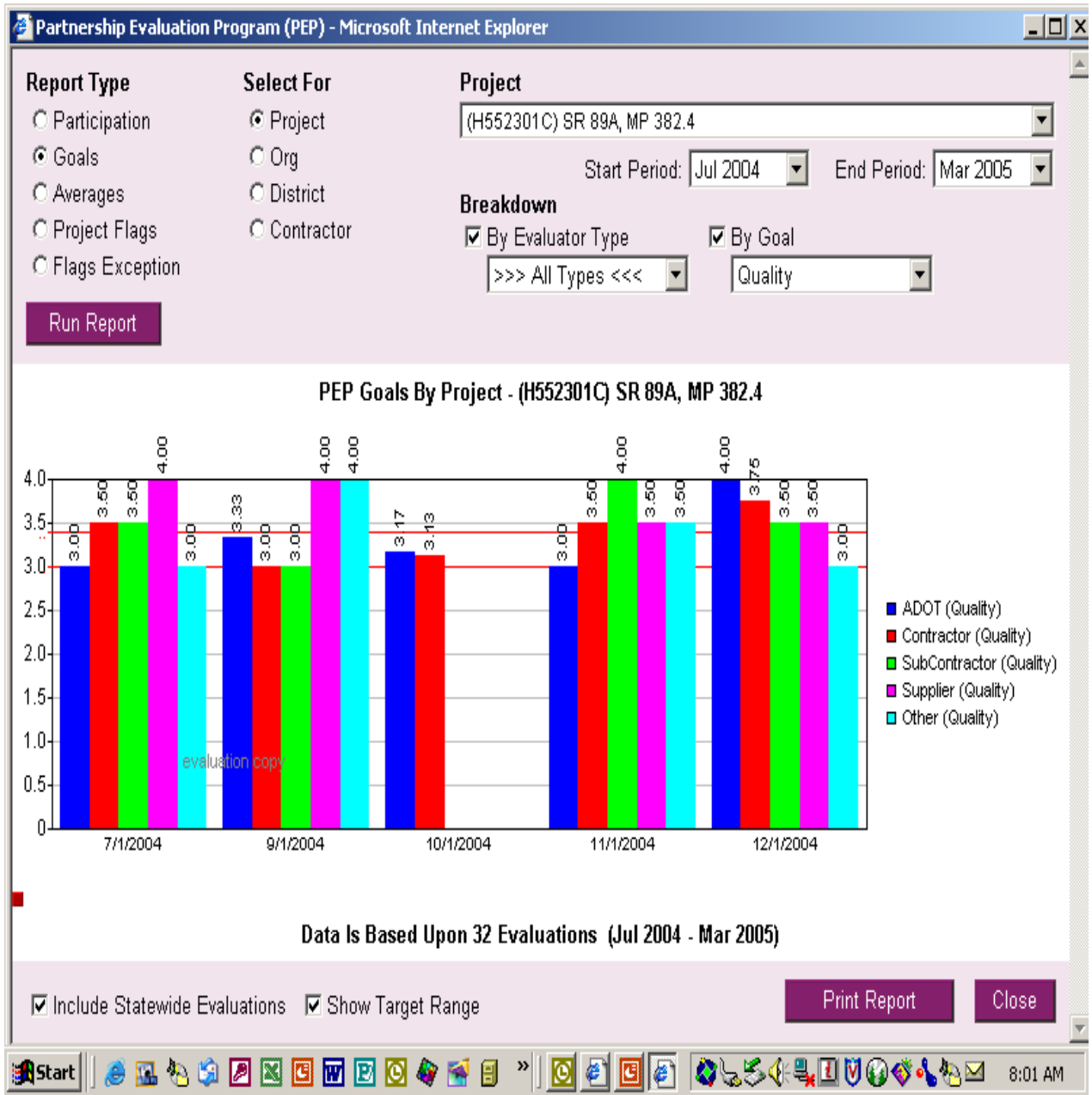
- 1) Click the 'Goals' option.
- 2) Click the option for which ratings for the reports will be filtered.
- 3) Select detailed criteria for which ratings will be included in the report.
- 4) Select the Period Date Range for which ratings will be included in the report as well as if the report should be broken-down by the Evaluator Type or Goal.
- 5) Select whether or not to include the statewide averages or target ranges on the summary report
- 6) Click 'Run Report'
- 7) The Goals summary report will be displayed.



Goals Report – Trend Analysis by “Quality”



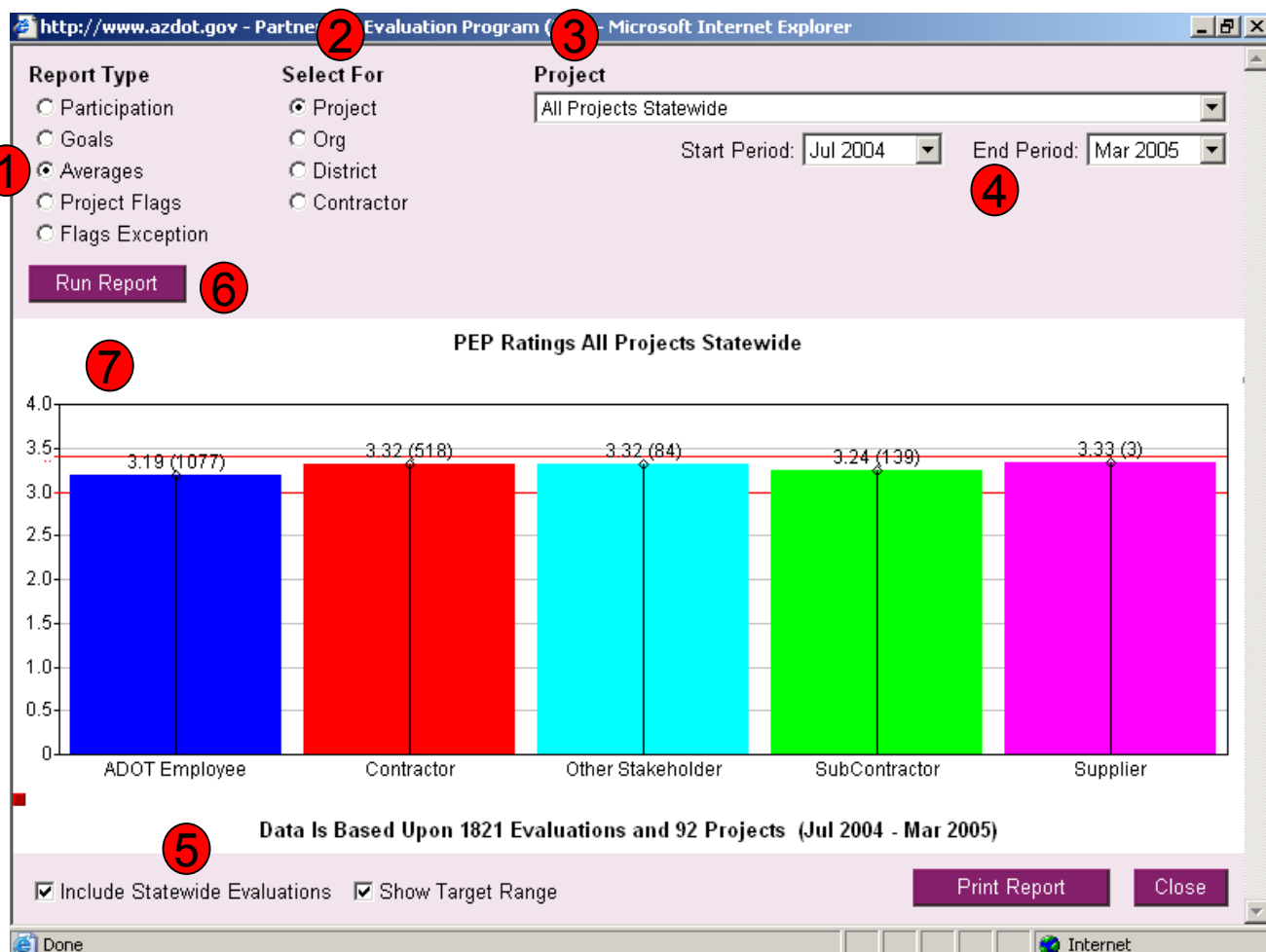
Goals Report – Trend Analysis by “Stakeholders”



Averages Report

The PEP Goals Summary Report displays information related to the average ratings by evaluator types for a specified criteria.

- 1) Click the 'Averages' option.
- 2) Click the option for which ratings for the reports will be filtered.
- 3) Select detailed criteria for which ratings will be included in the report.
- 4) Select the Period Date Range for which ratings will be included in the report.
- 5) Select whether or not to include the statewide averages or target ranges on the summary report
- 6) Click 'Run Report'
- 7) The Averages Summary Report will be displayed.



Project Flags Report

The PEP Goals Summary Report displays information related to the average ratings by evaluator types for a specified criteria.

- 1) Click the 'Project Flags' option.
- 2) Click the option for which ratings for the reports will be filtered.
- 3) Select detailed criteria for which ratings will be included in the report.
- 4) Select the Period Date Range for which ratings will be included in the report.
- 5) Select the type of ratings which will included in the report.
- 6) Click 'Run Report'
- 7) The Project Flags Report will be displayed.

http://www.azdot.gov - Partners Evaluation Program (3) - Microsoft Internet Explorer

Report Type

☐ Participation

☐ Goals

☐ Averages

☒ Project Flags

☐ Flags Exception

Select For

☒ Project

☐ Org

☐ District

☐ Contractor

Project

All Projects Statewide

Start Period: Jul 2004 End Period: Mar 2005

Rating Types

☒ Excelling ☒ Needs Help ☒ Met Goals

Run Report

PEP Flags All Projects Statewide
(Jul 2004 - Mar 2005)

Org	Federal ID / Project	Contractor	Period	ADOT Evals	ADOT Avg	Cont Evals	Cont Avg	Sub Evals	Sub Avg	Sup Evals	Sup Avg	Othr Evals	Oth Avg
4010S Ron Williams	FLH*404-0(001)A H426101C MOUNT GRAHAM ROAD	FNF CONSTRUCTION, INC. Time Used: 96.67% Percent Completed: 106.99%	7/2004	3	3.32	3	3.40	1	1.80			1	2.88
			8/2004	5	3.50	3	3.27	1	2.60			2	3.20
4020E Luis Mota	STP 085-B(013)A H595544C SR 85 MC 85 TO BASELINE	BISON CONTRACTING CO., INC. Time Used: 55.71% Percent Completed: 73.73%	8/2004	1	3.63	1	3.50					2	3.33
			10/2004	4	3.45	1	3.70					1	3.33
			11/2004	3	3.10	1	3.10					1	3.00
4020E Brian Howard	CM A/VN-0(003)A SS50901C LAS LIGAS & RIO VISTA AREA DSN	J. BANICKI CONSTRUCTION, INC. Time Used: 40.87% Percent Completed: 92.19%	7/2004	3	2.85	2	3.30					1	3.33
			8/2004	2	2.90	2	3.25					1	3.20
4050E Barry Brown	STP GIL-0(009)A SS50301C GILBERT PARK & RIDE	ARCHON, INC. Time Used: 73.85% Percent Completed: 33.95%	8/2004	5	2.98	2	3.20					1	3.50
			9/2004	4	3.08	1	2.80					1	3.33
			10/2004	4	3.10	2	3.10					1	3.33

☐ Include Statewide Evaluations ☐ Show Target Range

Print Report **Close**

Done Internet

Flags Exceptions Report

The PEP Flags Exception Report displays projects which have evaluation periods, missing ratings.

- 1) Click the 'Flags Exception' option.
- 2) Click the option for which ratings for the reports will be filtered.
- 3) Select detailed criteria for which ratings will be included in the report.
- 4) Select the Period Date Range for which ratings will be included in the report.
- 5) Click 'Run Report'
- 6) The Flags Exception Report will be displayed.
- 7) Shows Months that PEP Evaluations are missing

http://www.azdot.gov - Partnering Evaluation Program - Microsoft Internet Explorer

Report Type

☐ Participation

☐ Goals

☐ Averages

☐ Project Flags

☒ Flags Exception

Select For

☒ Project

☐ Org

☐ District

☐ Contractor

Project

All Projects Statewide

Start Period: Jul 2004 End Period: Mar 2005

Run Report

PEP Exceptions All Projects Statewide
(Jul 2004 - Mar 2005)

Org	Federal ID / Project	Contractor	Start Date	Period
4010S Ron Williams	FLH*404-0(001)A H426101C MOUNT GRAHAM ROAD	FNF CONSTRUCTION, INC. Time Used: 96.67% Percent Completed: 106.99%	10/20/2003	9/2004
7745E Girgis Girgis	N 900-A-539 H595602C RAMP METERING, PHASE 3	UTILITY CONSTRUCTION COMPANY, INC. Time Used: 100% Percent Completed: 102.29%	2/19/2004	7/2004
7745E Girgis Girgis	CM GLN-0(019)A SS49301C 59TH AVE(CMLBCK RD-UNION HLS)	HAN MAR ENERGY, INC. Time Used: 95.3% Percent Completed: 105.87%	8/4/2003	7/2004 8/2004
7758E Kirk Kiser	RAM 101-B-500 H551801C SCOTTSDALE RD - PIMA ROAD	SALT RIVER SAND & ROCK CO. Time Used: 104.38% Percent Completed: 93.59%	9/18/2002	7/2004
8130T Alfred Zuniga	S 083-A-500 H450901C JCT SR 82 TO MP 36.25	CAITLIN CONSTRUCTION, INC. Time Used: 95.1% Percent Completed: 105.63%	8/25/2003	7/2004 8/2004 9/2004 10/2004
8131T	S 086-A-504	THE ASHTON COMPANY, INC. CONTRACTORS &	7/7/2004	7/2004

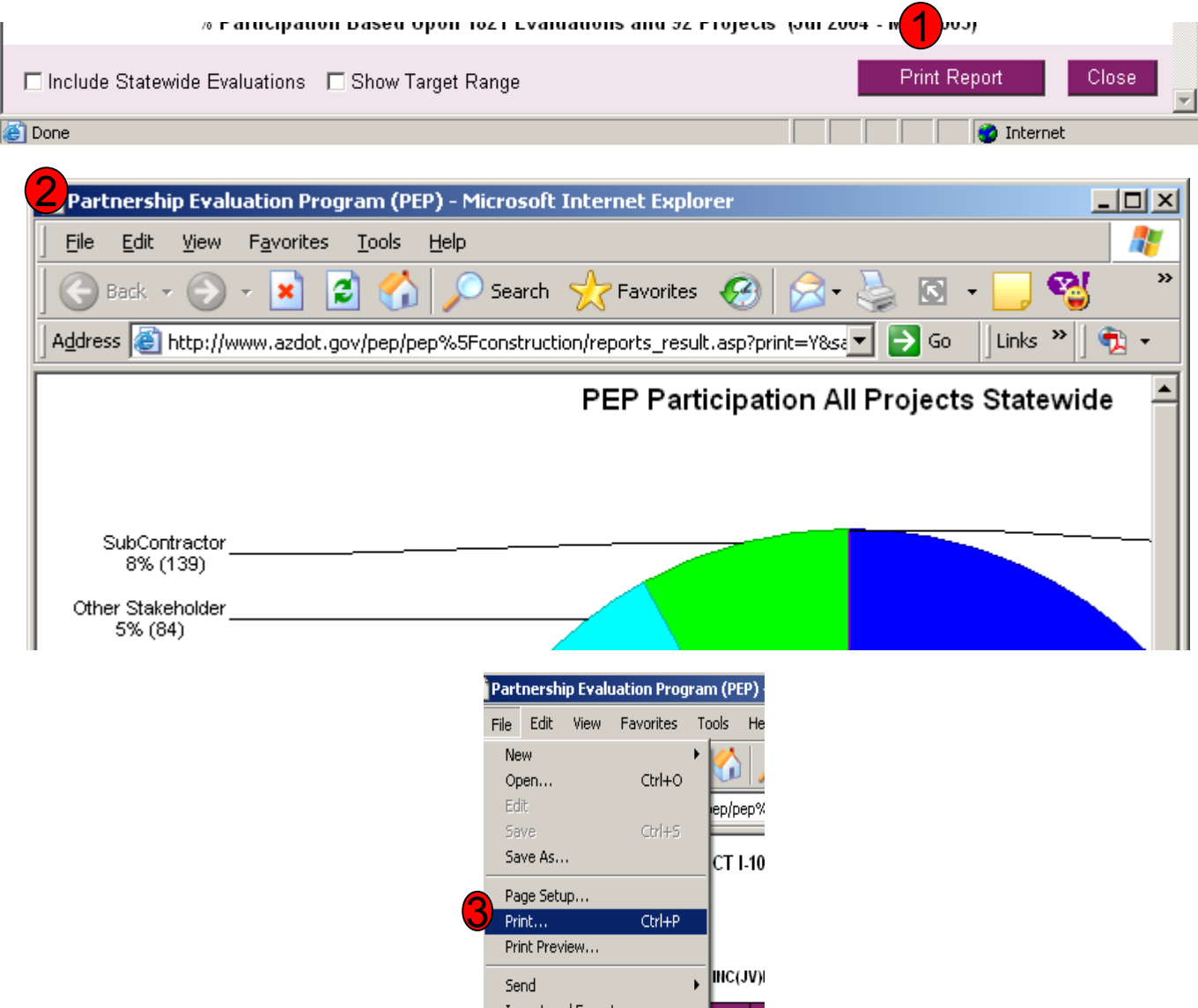
☐ Include Statewide Evaluations ☐ Show Target Range

Print Report **Close**

Done Internet

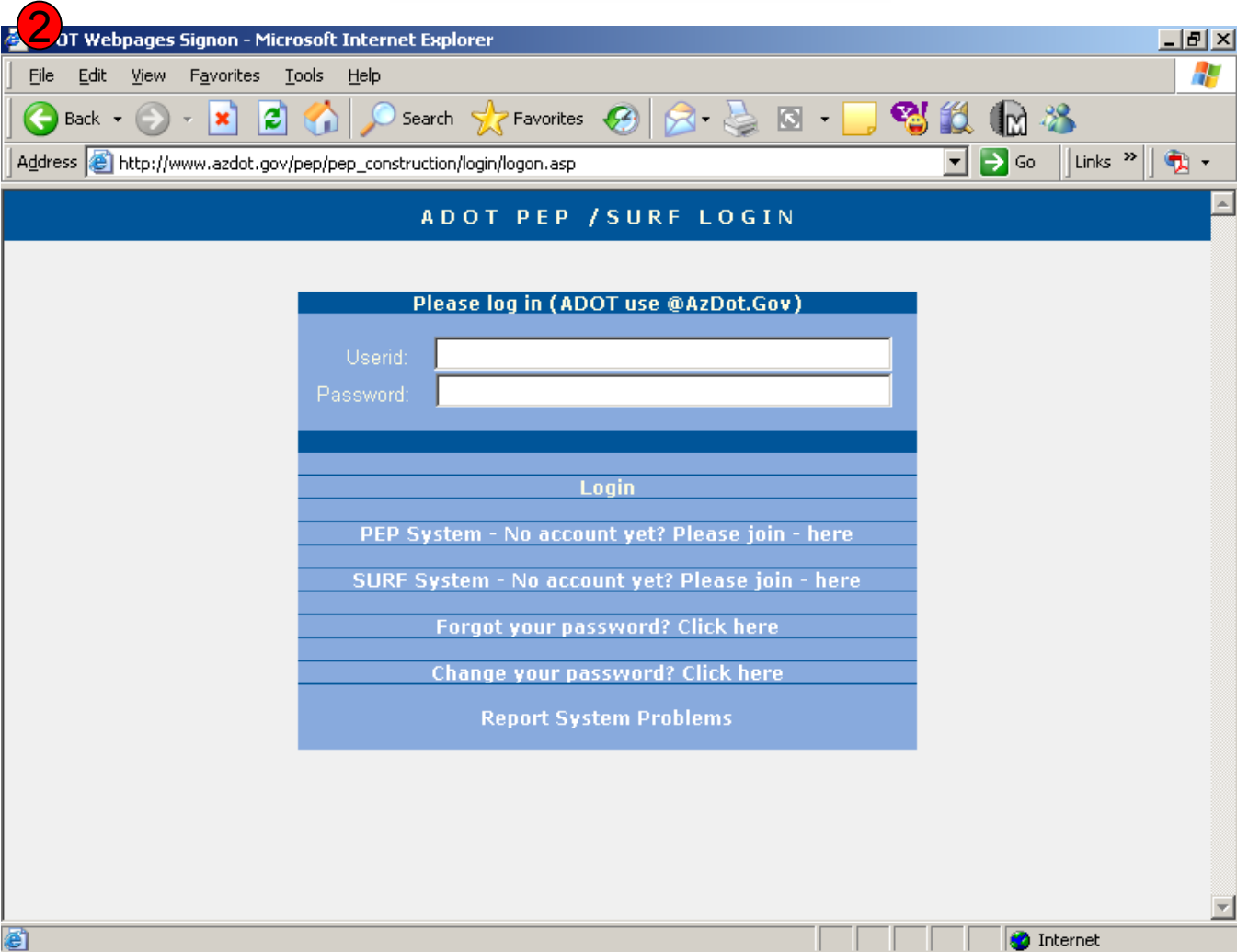
Printing Reports

- 1) Click the 'Print Report' button on the Summary Report Screen.
- 2) The ratings report will then be displayed.
- 3) From the File menu, select Print.



Logging Out Of PEP

- 1) Select 'Logout of PEP' from the PEP Main Menu.
- 2) The user will be logged out of PEP, and the PEP/Surf Login Screen will be displayed.



Customer Support

**For System Access & Issues – Contact the ADOT Support Desk
(602)712-7249**

**For Training Assistance – Contact the ADOT Partnering Office
Gary Sharp (602)712-7167
Judonne Greham (602)712-4875**